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ABSTRACT

This manual identifies the major changes for 2002-2003 in EDExpress, the electronic data exchange aspect of the Title IV student financial aid application process. It describes the major changes in the global EDExpress module and the App Express module and discusses locations for other resources describing changes in EDExpress. The Global Module refers to the functions in the EDExpress system that affect all modules or that do not relate to any specific module. Setting up user IDs and passwords is an example of a global function. The App Express module deals with the handling of the Free Application for Federal Student Aid (FAFSA) initial applications and corrections. Changes are described for: (1) installation; (2) access passwords; (3) printing; (4) setup; (5) tabs for the modules; (6) handling prior year data; (7) document tracking; (8) user-defined letter creation; (9) queries between or among fields; (10) renewal application; (11) message classes (types of message added); (12) importing data; (13) edits and skip logic (skipping fields); (14) financial aid application information; and (15) the verification worksheet. Several illustrations of new techniques are included. (SLD)

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EDExpress Training

Global and App Express Updates

2002 - 2003

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Participant Guide

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EDExpress Global and App Express Updates

Objectives

- Identify the major changes in EDExpress 2002-2003:
  - Global Module
  - App Express Module
- Discuss locations for other resources describing changes in EDExpress

1

Key Terms

App Express Module

App Express handles FAFSA initial applications and corrections. Within App Express, you can enter FAFSA data, edit and batch initial applications, enter corrections, and import and print ISIRs.

Global Module

Global refers to the functions within EDExpress that affect all modules or that do not relate to a specific module. Setting up user IDs and passwords is an example of a global function.

Import

Adds records that fit the appropriate data format to the EDExpress database.

Skip Logic

Skip Logic refers to the data entry process of "skipping" a data field(s) based on the value or completion of other fields. The data in the skipped field(s) are either unnecessary or irrelevant.

EDExpress Global

- Programs will appear under the cycle year
- Access Passwords no longer required
- Set a default output print destination
- Print setup now standard on all print dialog boxes

2

Installation

Starting with the 2002-2003 cycle, when the software is installed, all programs appear on the Start Menu under the cycle year; for example, "EDExpress 2002-2003." The title of the shortcut on the desktop shows the cycle year first, then product name; for example, "2002-2003 EDExpress."

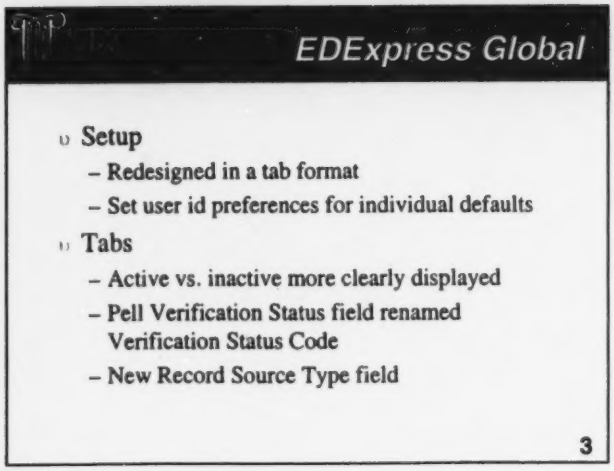
Access Passwords

The software no longer requires Access Passwords if the computer's system date has been changed to a date in the past. However, a warning message alerts you that the system date is different since the last time the software was accessed.

Printing

You can set a default for the report output destination option you use most; for example, Printer, File, or Screen. You can always change the output destination in the Print dialog box on a case-by-case basis, but the default setting remains in effect until you change it in Setup.

Print Setup, now a standard button on all Print screens, allows you to direct specific batch print jobs to alternative printers.


EDExpress Global
Setup
– Redesigned in a tab format
– Set user id preferences for individual defaults
Tabs
– Active vs. inactive more clearly displayed
– Pell Verification Status field renamed Verification Status Code
– New Record Source Type field
3

Setup

The Setup menu has been redesigned in a tab format by module with buttons for each setup option. This design allows you to go from option to option within a particular module without having to go through the menu options each time you exit a screen.

User ID is now a field in the Global System Setup dialog box, which enables you to establish individual preferences for Default System to Display, Single/Multiple (Default Print), Return to Dialog, and Default Report Output Destination.

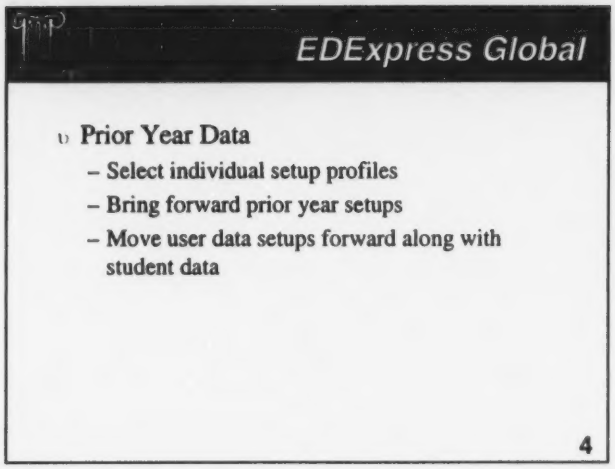
Tabs

EDExpress more clearly displays the active tabs versus the inactive tabs for all modules.

The Pell Verification Status field on the Demo tab has been renamed Verification Status Code. This field is for tracking purposes.

The valid values are W –Without Verification, V – Verified, and Blank. These are the three verification codes that will be exchanged with the Common Origination and Disbursement system for the Pell Grant Program.

A new Record Source Type field has been added to identify different types of data imported externally from other modules.


EDExpress Global
Prior Year Data
– Select individual setup profiles
– Bring forward prior year setups
– Move user data setups forward along with student data
4

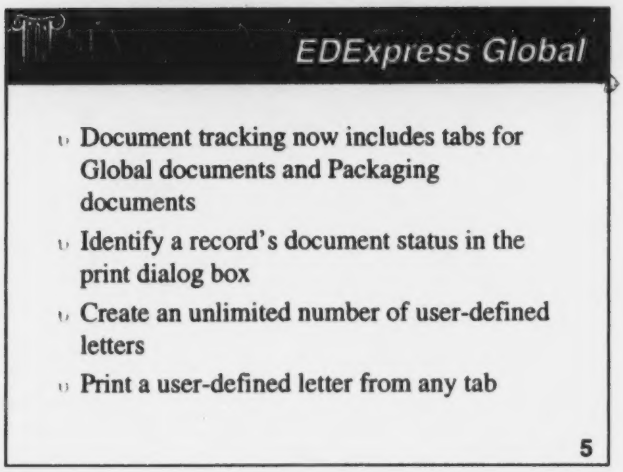
Prior Year Data

You can select individual setup profiles, as well as specific student records (where applicable), when using the Prior Year Import feature.

The following Prior Year setups can be brought forward from last year's version of EDExpress:

- Global: System, Demo Data (by student), User Database, and File Management
- Apps: System
- Packaging: System, User Formulas
- Direct Loan: School, System, Disbursement Profiles, Pnote Printer, and Tolerances
- Pell: School Default Flag

Your User Data setups can be moved forward, along with each student's corresponding student data.


EDExpress Global
Document tracking now includes tabs for Global documents and Packaging documents
Identify a record's document status in the print dialog box
Create an unlimited number of user-defined letters
Print a user-defined letter from any tab
5

Document Tracking

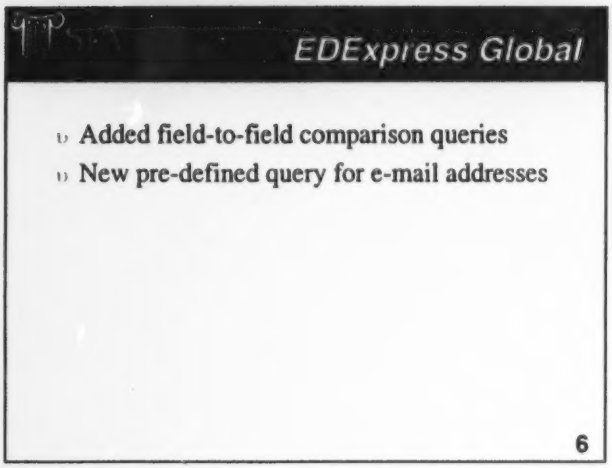
Document Tracking Setup has been modified to display two tabs, one for Global documents (with Application Processing queries available) and one for Packaging documents (with Packaging queries available).

You can identify a record's document status in the Print dialog box. The Document Status field has been added to help you filter the output for the List–Document Tracking by Student and List–Document Tracking by Document Code reports.

User-defined Letters

You can create an unlimited number of user-defined letters. You can also assign a letter to a particular module or make it available for printing in all modules. Module assignments can be changed at any time in Setup, and the printing process does not restrict a letter to a specific module after it has been printed.

A user-defined letter can be printed from any tab while you have a student record open, unless that letter is specifically assigned to a module within the software. Likewise, user-defined letters are printable through batch mode from all modules unless specifically assigned to a module.



Query

For 2002-2003, EDExpress features field-to-field comparison queries for numeric fields within a single ISIR transaction. Examples are provided in Help.

You can identify student records with a missing e- mail address using a predefined query of e- mail address = " ". The query is available in all modules.

Examples: Field to Field Queries

As an example of how to use this function, you can query on taxes paid as a percentage of AGI. The statement would look like this:

PARENTS' U.S. INCOME TAX PAID > PARENTS' ADJUSTED GROSS INCOME * .10 (or other percentage you choose)

More examples:

FATHER'S INCOME EARNED FROM WORK > PARENTS' ADJUSTED GROSS INCOME

MOTHER'S INCOME EARNED FROM WORK > PARENTS' ADJUSTED GROSS INCOME

STUDENT'S INCOME EARNED FROM WORK > STUDENT'S ADJUSTED GROSS INCOME

STUDENT'S U.S. INCOME TAX PAID > STUDENT'S ADJUSTED GROSS INCOME * 0.22 (or other percentage you choose)

WORKSHEET A > STUDENT'S ADJUSTED GROSS INCOME * 0.07 (or other percentage you choose)

WORKSHEET B > STUDENT'S ADJUSTED GROSS INCOME * 0.11 (or other percentage you choose)

WORKSHEET C > STUDENT'S ADJUSTED GROSS INCOME

EDExpress App Express

- Removed all Renewal Application functionality
- Added new message classes
- Display Pell Eligibility Flag and NSLDS Match Flag
- Import edit report identifies existing records for new ISIR transactions

7

Renewal Application

All Renewal FAFSA functionality has been removed from the 2002-2003 EDExpress software and the 2002-2003 version of the stand-alone Renewal Application software has been discontinued. This decision was based on discussions with Student Financial Aid (SFA) partners this spring. Examining the actual use of the electronic RAD files requested by participating schools during 2001-2002 and previous cycles, many schools requested and received electronic files during RAD request phases. However, few schools actually submitted electronic Renewal FAFSAs to the CPS. Since processing electronic RAD files has been discontinued, the need for the Renewal Application software has been eliminated.

Message Classes

The following message classes have been added in File Management:

- Added to ISIR data import
  - YTDNXXOP (ISIR YTD- State Non-Resident)
  - YTDRXXOP (ISIR YTD- State Resident)
  - FDRFXXOP (Processed FDRs)
- Added to Error Import
  - FDRUXXOP (FDR- State Agency, not on database)

Import Data

The Pell Eligibility Flag and NSLDS Match Flag (Default Indicator) for the transaction is displayed on the SAR/ISIR Tab on page 3 (FAA Info section).

Schools have requested a method of notification when a Packaging, Pell, or Direct Loan record exists for newly imported ISIR transactions. An option has been added to the ISIR Data Import dialog box to identify Packaging, Direct Loan, or Pell records already in the database. The information appears on the import edit report.

EDExpress App Express

- Field edits applied to SAR/ISIR tab only when record is saved
- Skip logic added to Legal Residence Date and Register for Selective Service? Fields
- FAA information screen added to View menu
- 50-byte memo field added to Verification Worksheet tab

8

Edits and Skip Logic

You can move from page to page on the SAR/ISIR tab without receiving edits. The software has been modified so the SAR/ISIR tab applies field edits only when the record is saved.

- Logic has been added to the FAFSA and SAR/ISIR tabs to skip the Legal Residence Date field when the answer to the corresponding Resident before 1/1/97? question is "Yes."
- Logic has been added to skip the Register for Selective Service? question when the answer to Are you male? is "No."

FAA Information

An FAA Information screen has been added to the View menu. It displays processed ISIR values such as Application Receipt Date, EFC, SAR C Flag, Match Flags, and Comment Codes for the transaction displayed.

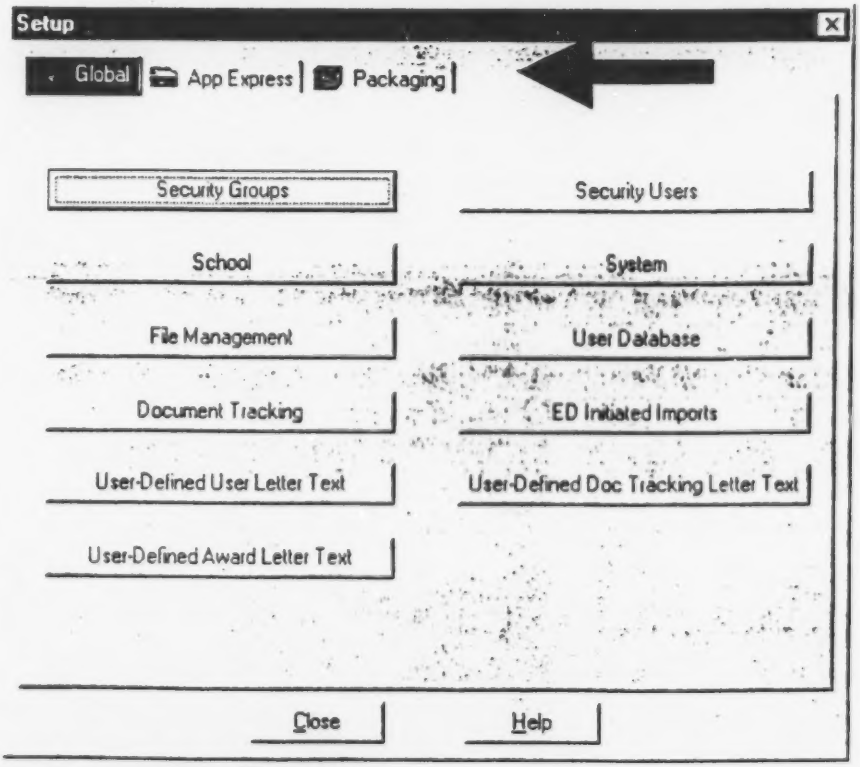
Verification Worksheet

A 50-byte memo field has been added to the Verification Worksheet tab for your comments. This memo field prints on the Verification Worksheet report.

New Tab Setup menu: Instructor Demonstration

In this demonstration, we show you the new feature that allows you to access setup options for each module via a tabular display.

Step	Action
1	From the Windows desktop, click **Start**.
2	Select **Programs/EDESuite/EDExpress 2002-2003/2002-2003 EDExpress for Windows.**
3	Type **APPS** as your User ID.
4	Type **APPS** as your Password.
5	Select **Tools/Setup** from the menu bar. The Setup dialog box displays on the tab (initially App Express) set as the default.
6	Click the **Global** and **Packaging** tabs to view the setup options for each.
7	Click **Close** when finished viewing the setup options.



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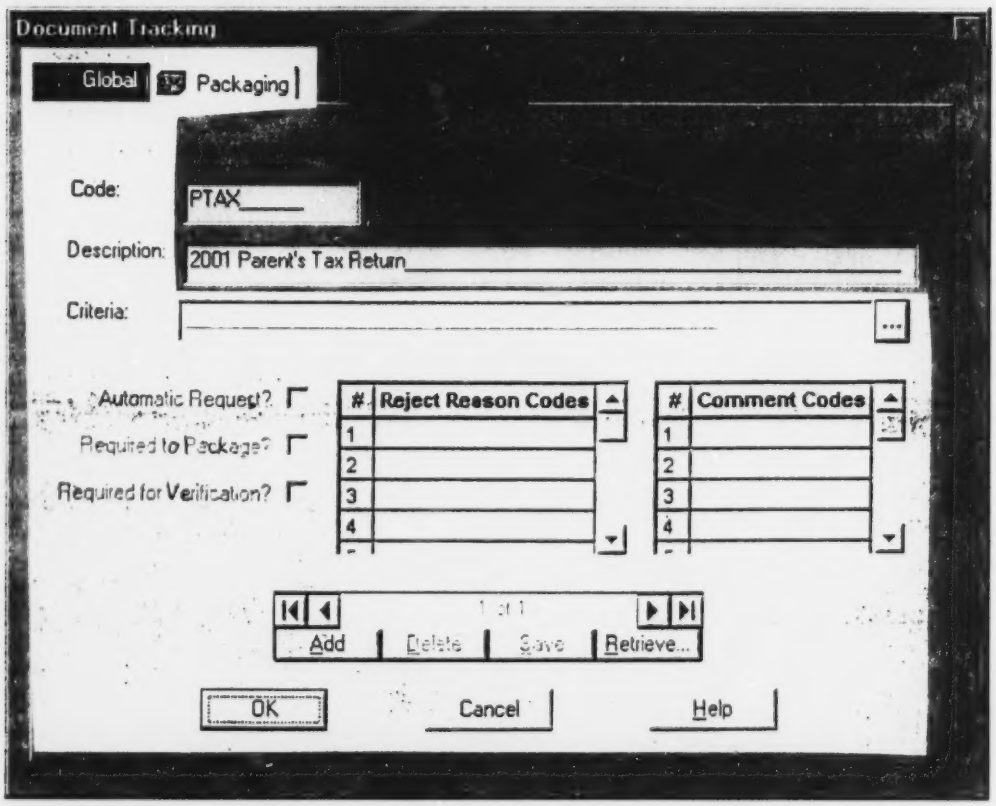
New Document Tracking Setup tabs:

Instructor Demonstration

In this demonstration, we show you one of the new tabular document tracking setup.

Step	Action
1	From the menu bar, select **Tools/Setup**.
2	Click on the **Global** tab.
3	Click the **Document Tracking** button.
4	Tabs are provided for creating global or packaging documents. Click either tab to view the options.
5	Click **OK** when finished.



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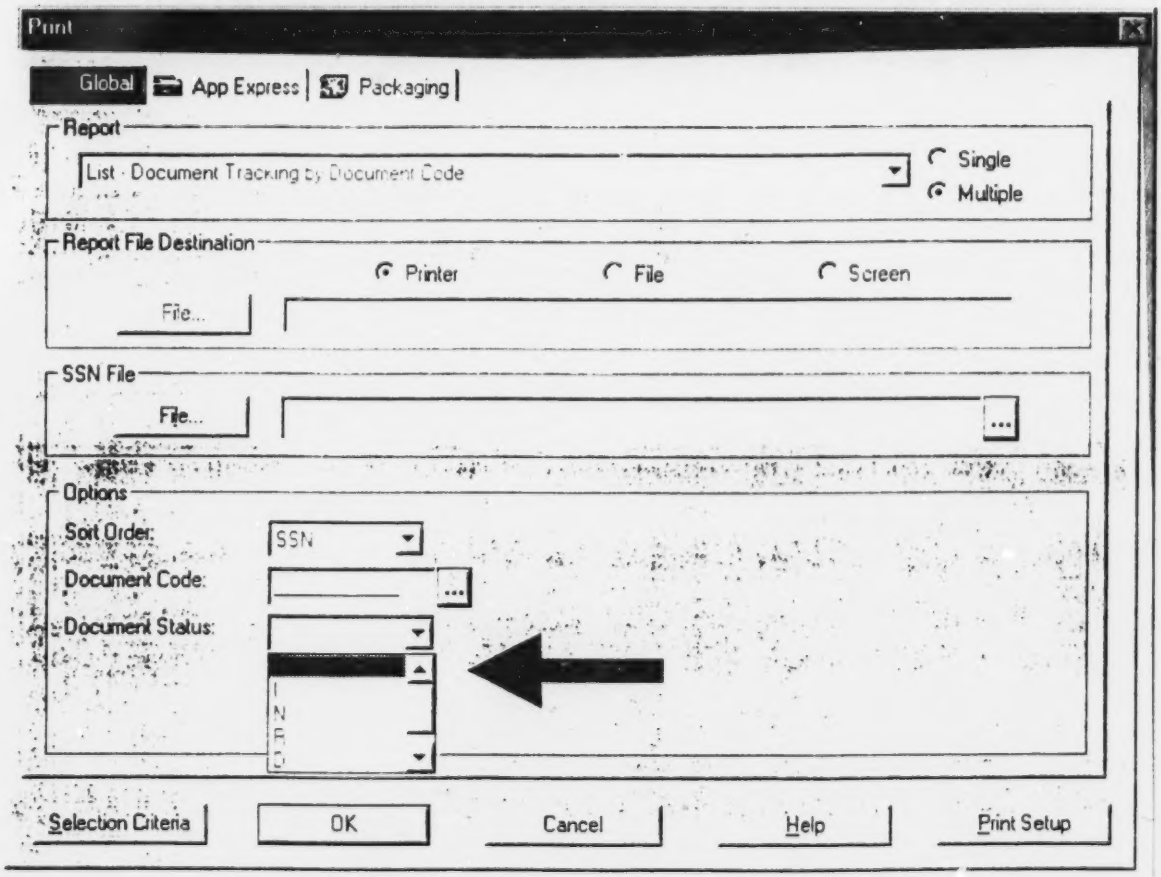
New Document Tracking Print Feature:

Instructor Demonstration

In this demonstration, we show you one of the new Global print features.

Step	Action
1	From the menu bar, select **File/Print**.
2	Click on the **Global** tab.
3	Click the **down arrow** in the Report text box and choose **List-Document Tracking by Document Code.** Click the **Multiple** radio button.
4	Note the filter options at the bottom of the window. You can now select Document Status as a filter for your list.



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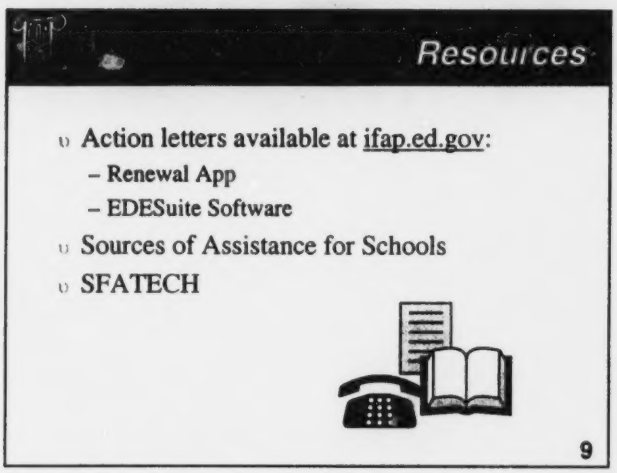

Resources

Resources are available if you want more information about the changes to the Renewal Application process and the EDE software suite for 2002-2003.

First, SFA issued two Action Letters in 2001 describing in detail the changes discussed in this session:

- Action Letter #1, issued August, 2001 describes changes to the Renewal Application process, procedures and tips for using SFA's FAA Access on the Web site and record layouts for Type 2 PIN request files.
- Action Letter #2, issued in November 2001 provides information about changes and enhancements to the 2002-2003 EDESuite software.

To access the letters, go to **ifap.ed.gov** and select Action Letters.

Contact information related to EDESuite products, such as help lines, Web sites, and e- mail addresses, has been removed from the on-line Help and all paper documentation. Instead, links to the new document *Sources of Assistance for Schools*, which is stored on the SFAdownload site, are listed in Help and in other documentation. The url for the SFAdownload site is:

sfadownload.ed.gov

We really want users to take advantage of the SFATech web site and list serve for any questions about how to use the new features of the software. To access this site:

1. Go to **ifap.ed.gov.**
2. Click **Additional SFA Related Sites** on the left side of the screen.
3. Then select **SFA Technical Support**.

Review

Questions about

EDExpress Global and App Express Modules?

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—PLEASE KEEP THIS FORM WITH THE DOCUMENT DURING PROCESSING—

FAST TRACK DOCUMENT

(Requiring Expedited Processing)

ASSIGNMENT: **Date:** 4-25-2002

TO: HE
(Assigned Clearinghouse)

Attention: _____

DOCUMENT TITLE/IDENTIFICATION *(Required for PRIORITY documents only):*

_____

_____

FAST TRACK JUSTIFICATION *(Check all that apply):*

- [x] Department of Education Document
  - [ ] OERI
  - [ ] NCES
- [ ] Congressional Document
- [ ] Executive Office of the President Document
- [ ] Major National Association, Foundation, Non-Profit Institution Document
- [ ] High Media Exposure Document
- [ ] Other Reason (Specify): _____
- [ ] PRIORITY status (specified by ERIC Program Office)

PROCESSING DATA *(Required for PRIORITY Documents only):*

- Date Acquired by Facility: _____
- Date Shipped to Clearinghouse: _____
- Date Received by Clearinghouse: _____
- **Date Required back at Facility:** _____
- Date Bibliographic Data Transmitted: _____
- Date Document Mailed Back by Clearinghouse: _____
  Clearinghouse Accession #: _____
- Date Received Back at Facility: _____
  RIE Issue _____ **ED #** _____

SPECIAL PROCESSING INSTRUCTIONS:

_____

_____

_____

— See over for general *FAST TRACK* instructions —

—PLEASE KEEP THIS FORM WITH THE DOCUMENT DURING PROCESSING—

Fast Track Instructions

Fast Track documents require expedited processing. *All* Fast Track documents should be processed *promptly*, i.e., placed first in line amongst the next documents to be processed.

Special Instructions for Fast Track Documents Designated PRIORITY:

Fast Track documents assigned PRIORITY status must be processed in time to make the next possible monthly database update. PRIORITY documents are given a **due date** by which they (and their completed resumes) must be returned.

When returning PRIORITY documents:

① use a separate log sheet (to be faxed to Facility);

② mail the document individually (not in the regular weekly batch);

③ transmit the bibliographic data as a separate file (not as an item in the regular weekly batch).

(Other Fast Track documents, not designated PRIORITY, may be included in the regular weekly shipments and transmissions).

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